

# CHARTER SCHOOL FACILITY PROGRAM

Presented by  
The Office of Public School  
Construction

Lisa Constancio  
Elizabeth Dearstyne

# TOPICS OF DISCUSSION

- General Information
- Program Eligibility
- Filing Periods
- Application Submittal
- Preliminary Apportionment Determination
- Funding Criteria
- The Next Steps
- Project Conversion
- Things to Keep in Mind
- Fund Release Process
- Use of the Facility
- Interaction with CSFA
- Resource Information

# Charter School

## GENERAL INFORMATION

- \$100 million in the 2002 Bond and \$300 million in the 2004 Bond.
- Must reside and serve pupils within school district boundaries.
- Will receive a preliminary apportionment for the new construction of school facilities.
- May file an application on its own behalf, or
- The school district may file on behalf of the Charter School.

# Charter School PROGRAM ELIGIBILITY

- Must have appropriate School Facility Program (SFP) new construction eligibility (verified by OPSC).
- Must be deemed “financially sound” by the California School Finance Authority (CSFA).
- Pupils served in the application must be “classroom based-instruction”.

# Charter School FILING PERIODS

- Filing period will begin mid-February and end March 31, 2003.
- As funding becomes available, the State Allocation Board (SAB) may establish subsequent filing periods as necessary.

# Charter School APPLICATION SUBMITTAL

- Complete Application Package
  - *Application for Charter School Preliminary Apportionment, Form SAB 50-09*
    - *Historical documents (Site Development/relocation expenses)*
    - *Site Acquisition (Appraisal, Preliminary Appraisal, or Median Cost)*
  - *Charter School Facility Funding Application, Form CSFA 03-01*
    - *Including all required financial documents (2 copies)*
  - *School Facility Program New Construction Eligibility Documents (Form SAB 50-01, 50-02, 50-03), as required from school district*
- Information Listing — Free/Reduced Lunch and

The school district or charter school named below applies to the State Allocation Board via the Office of Public School Construction for a Preliminary Apportionment under the provisions of Chapter 12.5, Part 10, Division 1, Article 12, commencing with Section 17078.50, et seq. of the Education Code and the Regulations there to.

|   |  |                                       |
|---|--|---------------------------------------|
| <input type="checkbox"/> SCHOOL DISTRICT APPLYING ON BEHALF OF CHARTER SCHOOL <input type="checkbox"/> CHARTER SCHOOL APPLYING ON ITS OWN |  | PRELIMINARY APPLICATION NUMBER<br>547 |
| PROPOSED PROJECT NAME   |  | PROJECT TRACKING NUMBER               |
| COUNTY  | WILL A SCHOOL ATTENDANCE AREA (1) APPLY? |                                       |

**1. Type of Project**

- a. ☐ Elementary School ☐ Middle School ☐ High School

Pupils Assigned:

K-6: \_\_\_\_\_

7-8: \_\_\_\_\_

9-12: \_\_\_\_\_

Non-severe: \_\_\_\_\_

Severe: \_\_\_\_\_

- b. Name of school district that pupils are coming from: \_\_\_\_\_

- c. Addition to existing site? ☐ Yes ☐ No

If yes, school name: \_\_\_\_\_

**2. Number of Classrooms/Useable Acres**

Number of Classrooms: \_\_\_\_\_

Existing Useable Acres: \_\_\_\_\_

Proposed Useable Acres: \_\_\_\_\_

**3. Increase in Preliminary Apportionment**

- a. ☐ Multilevel Construction

b. Site Acquisition:

1.) 50 percent appraised value or median cost: \$ \_\_\_\_\_

2.) Relocation/OTSC Cost:

☐ 21 Percent

☐ 50 percent of spec'd cost or historical cost: \$ \_\_\_\_\_

**c. Site Development:**

☐ \$70,000 per proposed Useable Acre

☐ 50 percent of spec'd cost or historical cost: \$ \_\_\_\_\_

**d. ☐ Small New School Allowance****e. ☐ Urban Allowance**

f. ☐ Geographic Percentage Factor: \_\_\_\_\_ %

**4. Priority Order # \_\_\_\_\_****5. Charter School Information:**

a. Current Charter School Enrollment: \_\_\_\_\_

b. Is Charter School not for profit? ☐ Yes ☐ No

c. Enter locale code of Charter School: \_\_\_\_\_

d. Free/Reduced lunch: \_\_\_\_\_ %

e. Additional Application Number: \_\_\_\_\_

# Charter School

## **PRELIMINARY APPORTIONMENT DETERMINATION**

- Per-pupil Grant Allowance:
  - K-6: \$5,870
  - 7-8: \$6,214
  - 9-12: \$8,116
- Additional Grants may be provided for:
  - Multi-level Construction
  - Site Acquisition Costs
  - Site Development
  - Small New School
  - Geographic Percentage
  - Urban Allowance
  - Inflator Factor



# Charter School

## FUNDING CRITERIA

- Applications will be categorized into the following:
  - Geographical Region One, Two, Three, or Four
  - Urban, Rural, or Suburban
  - Large, Medium, or Small Charter Schools
  - K-6, 7-8, or 9-12
- Preference Points (100 points maximum):
  - Overcrowded School Districts – up to 40 points
  - Low-income Charter Schools – up to 40

# Charter School

## THE NEXT STEPS

- Anticipated Apportionment Date: June 25, 2003 State Allocation Board Meeting.
- Four (4) years to design project, acquire a site, etc.
- The preliminary apportionment must be converted within four (4) years from the date the SAB approved the preliminary apportionment.
- One-year extension may be granted by SAB in certain circumstances.

# Charter School PROJECT CONVERSION

- Final Apportionment Conversion
  - Submittal of *Application for Funding, Form SAB 50-04*
  - Final Division of the State Architect (DSA) plans
  - California Department of Education (CDE) site and plan approval
  - Department of Toxic Substance Control site approval, if applicable
  - Re-review by CSFA to assure Charter School still meets Financial Soundness criteria

# Charter School PROJECT CONVERSION

| If   | Then  |
|--|---|
| Additional funding <b>is</b> needed to complete project and funds are available        | A charter may receive a project increase for eligible costs.  |
| Additional funding <b>is</b> needed to complete project and funds are not available... | The preliminary apportionment amount will be the full and final apportionment.  |
| Additional funding <b>is not</b> needed to complete project...                         | <ol style="list-style-type: none"><li>1. The additional reservation of funding shall be adjusted to reflect the actual project costs.</li><li>2. Project costs remain the same and the final Board item will reflect preliminary apportionment amounts.</li></ol> |

# Charter School

## THINGS TO KEEP IN MIND...

- Project Design
  - Preliminary Apportionment vs. Final Costs
    - Justification of project costs at time of Final Apportionment
  - Final Apportionment pupil grant request cannot exceed Preliminary Apportionment request
- School Facility Program Requirements
  - 60% commensurate
  - Site Acquisition Guidelines
  - Leased land not eligible for reimbursement
  - Self-Certifications

# Charter School FUND RELEASE PROCESS

- After the final conversion and apportionment, the Charter School must submit a *Fund Release Authorization, Form SAB 50-05* within 18 months of the final apportionment.
- Certifies it has entered into contracts for at least 50% of the construction work included in the plans.
- Certify that Labor Compliance Program is approved by the Department of Industrial Relations

# Charter School USE OF THE FACILITY

- May use facility until no longer needed.
- Once facility is no longer needed by the Charter School, any other charter may use the facility.
- Once the facility is longer needed by any charter school, the school district may elect to occupy facility for instructional purposes or sell the facility.

# Charter School INTERACTION WITH CSFA

- OPSC Responsibilities:
  - Determining school district has SFP new construction eligibility
  - Determining preliminary apportionment amount
  - Receiving Charter School Lease Payments
- CSFA Responsibilities:
  - Determining that Charter School is financially sound
  - Determining lease amount and local contribution amount
- Joint-Report to Legislature by July 1, 2003 on status of program



# Charter School RESOURCE INFORMATION

- OPSC's Web Site: [www.opsc.dgs.ca.gov](http://www.opsc.dgs.ca.gov)
  - SFP Regulations and Forms
  - SFP Guidebook
  - Charter School Information Listing
  - Project Tracking/Eligibility Listing
  - Links to other relevant agencies
- Contact Information
  - Lisa Constancio, (916) 322-0317,  
[lconstan@dgs.ca.gov](mailto:lconstan@dgs.ca.gov)
  - Elizabeth Dearstyne, (916) 323-0073,  
[edearsty@dgs.ca.gov](mailto:edearsty@dgs.ca.gov)